

Quick Start Guide

For Managers and Administrators

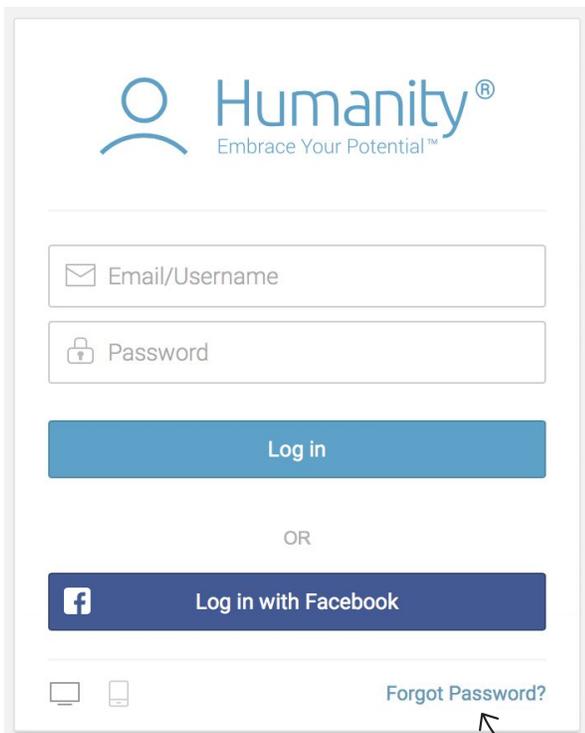
Quick Start Guide

Welcome to Humanity, the online scheduling platform that optimizes **employee scheduling, time tracking, vacation management, and payroll.**

Get started by logging in and creating accounts for your employees. The Dashboard is where you'll create locations, positions and add additional information about your scheduling preferences.

Once you activate employee accounts and they've entered their availability, you're ready to create a schedule. For additional information, best practices, and support, visit helpcenter.humanity.com.

Step 1: Log in to your account



Google Chrome or Firefox are recommended for the best user experience and performance. Humanity can also be accessed using the latest versions of Safari, Internet Explorer and Opera, but users may experience performance and/or usage issues.

To access your Humanity account, visit humanity.com/app and log into your account using the username and password created upon signup. If you cannot remember your password, click the "Forgot Password?" link on the sign-in page.

FORGOT PASSWORD LINK

Step 2: Create accounts for employees

Best practice: save time activating employees by ensuring each one has an email address. Or import employees using the link at the bottom of the Staff tab.

Visit the Staff tab to create accounts for your employees. From the upper right corner, select Add Employees to create accounts in bulk.

Add Employees

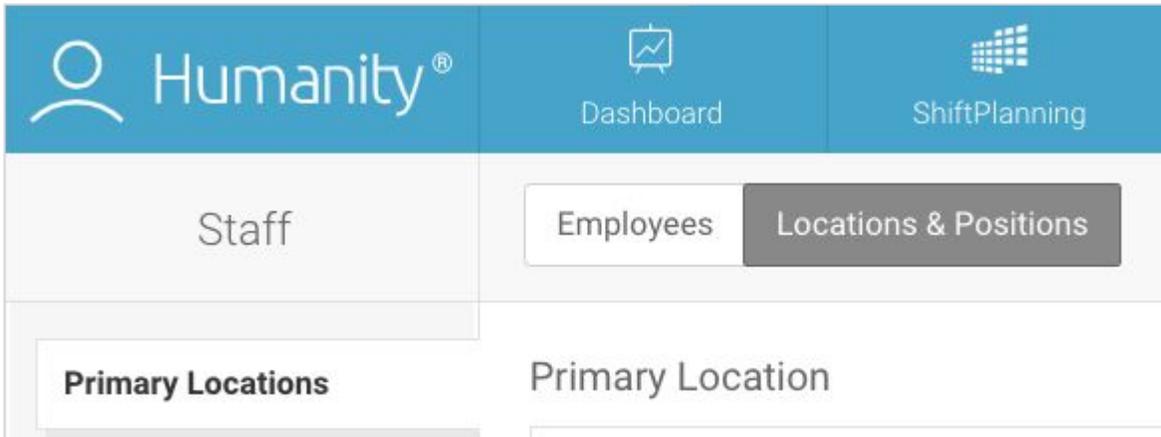
	First Name	Last Name	Email
	first name	last name	email@address.com
	first name	last name	email@address.com
	first name	last name	email@address.com
	first name	last name	email@address.com
	first name	last name	email@address.com
	first name	last name	email@address.com
	first name	last name	email@address.com

Save Employees

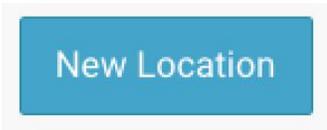
At the bottom of your screen, there are links if you wish to import your employees or to fill out a detailed form (recommended if adding one employee at a time).

Step 3: Create locations and positions

From the **Staff** tab, find the **Locations & Positions** subtab below the top navigation bar.

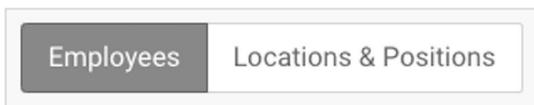


In the upper right corner, select **New Location**.
Once you've created a location, you can add positions.

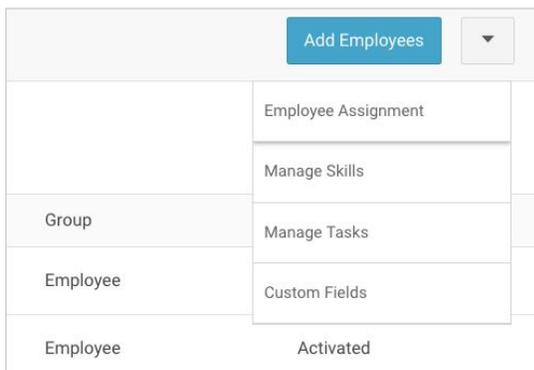


Depending on your business, positions may be used as:

- **Departments** (Admin, Nursing, Pharmacy)
- **Job Roles** (Floater, Operator, Volunteer)
- **Titles** (Neurologist, Head Nurse, ER Doctor)



Assign employees to positions by going back to the **Employees** subtab.



In the dropdown menu next to the **Add Employees**, find **Employee Assignment**.

Use Employee, Position or Skill filters for quick assignments.

Step 4: Create accounts for employees

Best practice: for security purposes, employees should create their own passwords. Use their email addresses to activate them in mass. Manually activated accounts will default to “password” as the account password.

From the Employees subtab, select one of your employees by clicking on their name. Scroll down to find the section labeled **Admin Actions**.

Admin Actions

Status:  **User account is not activated.** [Send activation e-mail now!](#) · [Manually Activate](#)

Activation: User Account is Enabled. [Disable It](#) 

Delete: [Click Here](#) to delete this Employee.

All Staff (47)

Not Activated (5)

Disabled (0)

To activate an account by email or to mass activate all employee accounts, select your **Not Activated** staff from the left hand side, and select the **Send Activation E-mail Now** button from the top banner.

Employees | Locations & Positions

You currently have **47 Employees**.

There are **5 employees** that haven't activated their accounts yet.

Step 5: Settings

Best practice: auto-enable Leave Types in bulk for new or existing staff. Simply put, employees can only request the type of leave that has been enabled to them.

Customize settings at the account level

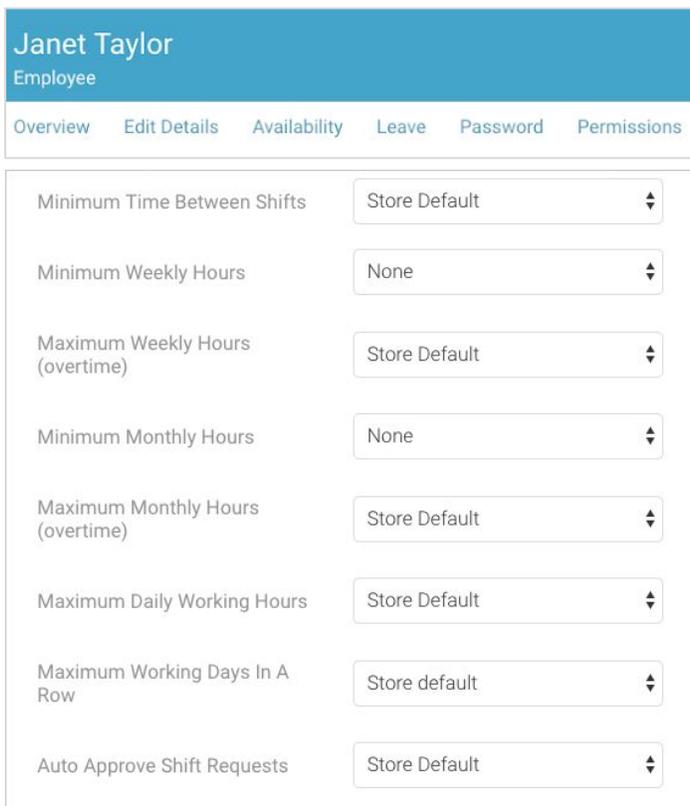
Under **ShiftPlanning**, enable employees to trade shifts and drop shifts, and customize whether those actions can happen with or without manager's approval.

Under **Leave & Availability**, create the type of leaves an employee can take, such as Sick Days, Vacation, Unpaid time off, Bereavement, Maternity/Paternity Leave, etc. After you've created leave types, enable them for each of your employees.

For a thorough how-to on Leave, visit our Help Center.

LEARN MORE

Customize settings at the employee level



Janet Taylor Employee	
Overview Edit Details Availability Leave Password Permissions	
Minimum Time Between Shifts	Store Default
Minimum Weekly Hours	None
Maximum Weekly Hours (overtime)	Store Default
Minimum Monthly Hours	None
Maximum Monthly Hours (overtime)	Store Default
Maximum Daily Working Hours	Store Default
Maximum Working Days In A Row	Store default
Auto Approve Shift Requests	Store Default

From the **Staff** tab, select an individual employee.

Under **Edit Details**, set up the minimum and maximum hours an employee can work in a day and week. Inputting this information for each employee will make creating a schedule effortless.

Select **Leave** to enable or disable the type of leaves an employee can use.

Visit **Permissions** to change the account type for Supervisors and Manager and select the positions they should be able to schedule/ manage.

Step 6: Availability

Best practice: create a schedule after employees update their availability. All employees are by default available 24 hours a day.

As an employer, you have the option to update your employees' available working hours. However, it is recommended that employees set their availability from the mobile app (or by signing in to their accounts from their desktop). By default, their availability indicates they are available to work, everyday and all hours of the day. It is important for employees to enter the hours they are able to work, so they are not scheduled for shifts they are not available.

Janet Taylor
Employee

Overview Edit Details Availability Password Notifications

WEEKLY AVAILABILITY Available Unavailable Partially Unavailable Per 60 min Per 15 min

Click in the grid below to change your availability during that time slot.
Hint - Click and drag with your mouse to quickly select multiple blocks together.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
1 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
2 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
3 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
4 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
5 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
6 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
7 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
8 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
9 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
10 am	Unavailable	Unavailable	Available	Available	Available	Unavailable	Available
11 am	Available	Available	Available	Available	Available	Unavailable	Available

Future Availability

Humanity allows you to set your availability for specific dates in the future. Future availability settings override your weekly availability on that specific date.

Mon, Nov 12, 2018

am	12	1	2	3	4	5	6	7	8	9	10	11
pm	12	1	2	3	4	5	6	7	8	9	10	11

[Click here](#) to manage your availability in 15 min increments.

This is shown in your timezone, as a result, the second pair of 12 hour intervals is a continuation into the next day as a result of a timezone difference.

Future availability is used by employees to let employers know when they are not available for a one-off instance, when their weekly (regular) availability states otherwise. Also, employees can use it to let their managers know when they are available to work, when normally they cannot.

Employees can use future availability to announce an upcoming doctor's appointment, or to pick up extra hours over the holiday season.

Step 7: Build a schedule with ShiftPlanning

From the **ShiftPlanning** tab, create a shift for your positions or employees. It is recommended to build out a schedule from the **Position View** at a week's glance.

After you've created a shift, select it to:

- **Create a recurring shift**
- **Assign staff**
- Add **Shift Notes**
- Set **Open Slots**

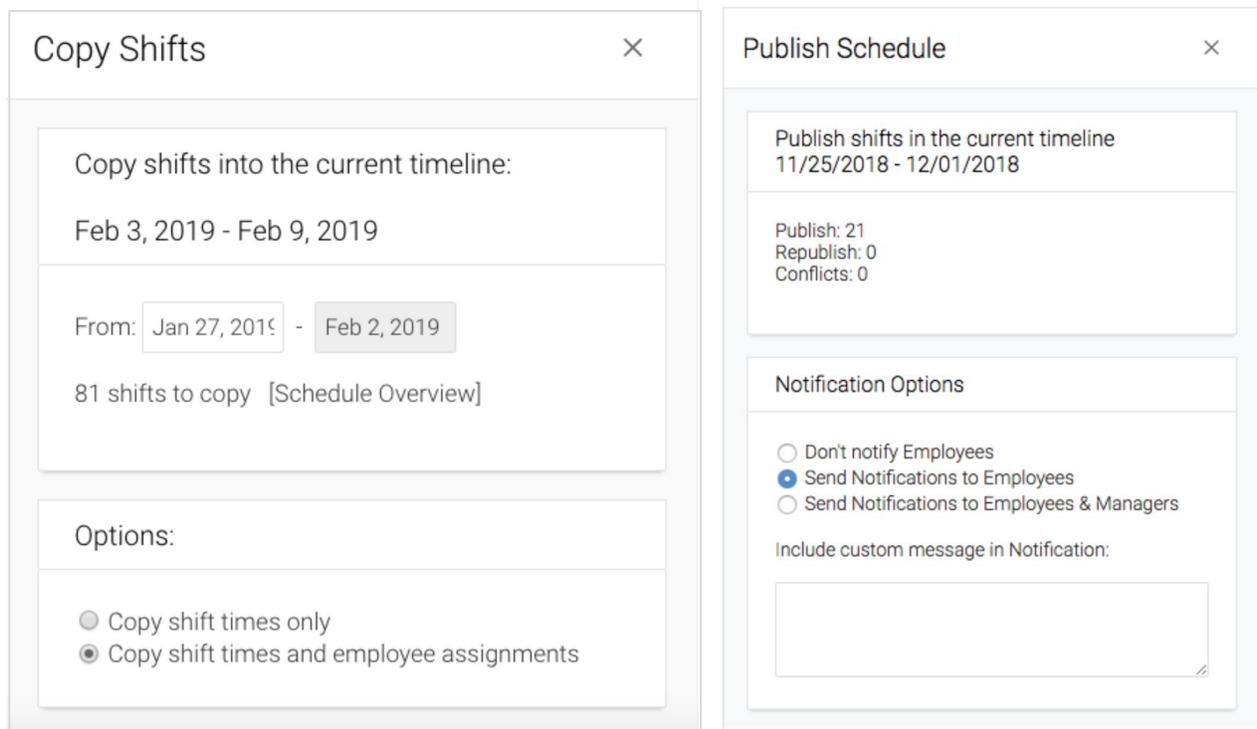
The screenshot shows a modal window for configuring a shift. The modal is titled "Nurse" and has a subtitle "Click here to add title". It contains several sections:

- Date:** Nov 16, 2018 – Nov 16, 2018
- Time:** 8:00am – 4:00pm (8 hrs)
- Repeat Options:** Includes an information icon and a "Set Open Slots" link.
- Location:** No Remote Site Set (with an information icon).
- Notes:** A text area for adding notes.
- Available Staff:** A list of employees with checkboxes:
 - Leona Jorgensen
 - Mary Burgoyne
 - Pamela Peraza
 - Sarah Cahill
- Multiple Conflicts:** A list of employees with checkboxes and a red warning icon:
 - Jessica Torres (40)
 - Madeline McKay (40)
 - Nancy Causey (40)
- Staff from other Positions:** A link to view staff from other positions.
- Actions:** "Delete this Shift", "Cancel", and "Save & Close" buttons.

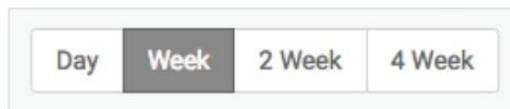
Once you've selected a shift, on the right side you'll see Available employees and others with conflicts. A number in parentheses represents the number of hours they've been assigned for the week. Workers with a red warning icon indicate a conflict of some type in their schedule, leave, or future availability.

Best practice: save Schedule Templates by clicking the star icon at the top right of the schedule. Changes made to templated schedules will override the previously saved template and used going forward.

When you start a new week, you can copy one of your templates into the blank week by selecting **Copy Schedule** from the dropdown in the upper right corner. You can choose to copy the shifts alone or the shifts with the specific employees assigned to them. After you've finished modifying the schedule, you can **Publish** it so the staff can access it.



Publish schedule to distribute the latest schedule to all employees. The schedule you'd be viewing will be the shifts that are published (one week, four weeks, etc.). In case of any changes to a previously published schedule, the schedule needs to be published again.



Time Clock

Employees have multiple options when clocking in for their shifts.

- They can use their Humanity App to **clock in and out**.
- You can create physical time clocks so they can clock in and out from a designated terminal, such as a computer, laptop or tablet.

Time Clock Settings
Time Clock Module Enabled.
Employees must use webcam when they clock in & out
Require GPS data when clock in & out
Restrict Employees From Clocking In/Out
Enable Break Button
The system automatically clock-out employees after <i>n</i> working hours.
Enable Timeclock Tips *New

- Use settings to customize whether clocking in/out requires GPS data, if it should take place at specific locations or stations, if it requires capturing a photo to prevent buddy clocking or for employees to log in using their username and password.
- When employees use the Time Clock feature, settings can be customized so their **managers or supervisors must approve of their timesheets**.

To require employees to clock in from specific locations and terminals, you must create a **Time Clock Location**. After creating a location, you must create a **Time Clock Terminal**.

If employees will clock in/out from their Humanity App only, then you do not need to create any additional Time Clock Locations.

Leave

If employees can request time off (whether paid or unpaid), use our **Leave** module to approve or reject leave requests. Employees can request time off using the Leave feature to request partial or full days off. Customize how far in advance employees must request specific leave types, such as vacations or paid time off.

CLICK ON TIME OF CONFLICT

Conflicts	Unavailable All Day	Leave Type	Actions
8:00am-4:00pm Dec 31, 2018		Vacation	<input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="button" value="Check"/>
8:00am-4:00pm Jan 1, 2019			
8:00am-4:00pm Jan 2, 2019			

If an employee requests time off when they are scheduled to work, before you approve or reject their leave request, Humanity shows you what shift needs to be covered and which employees are available to replace those employees.

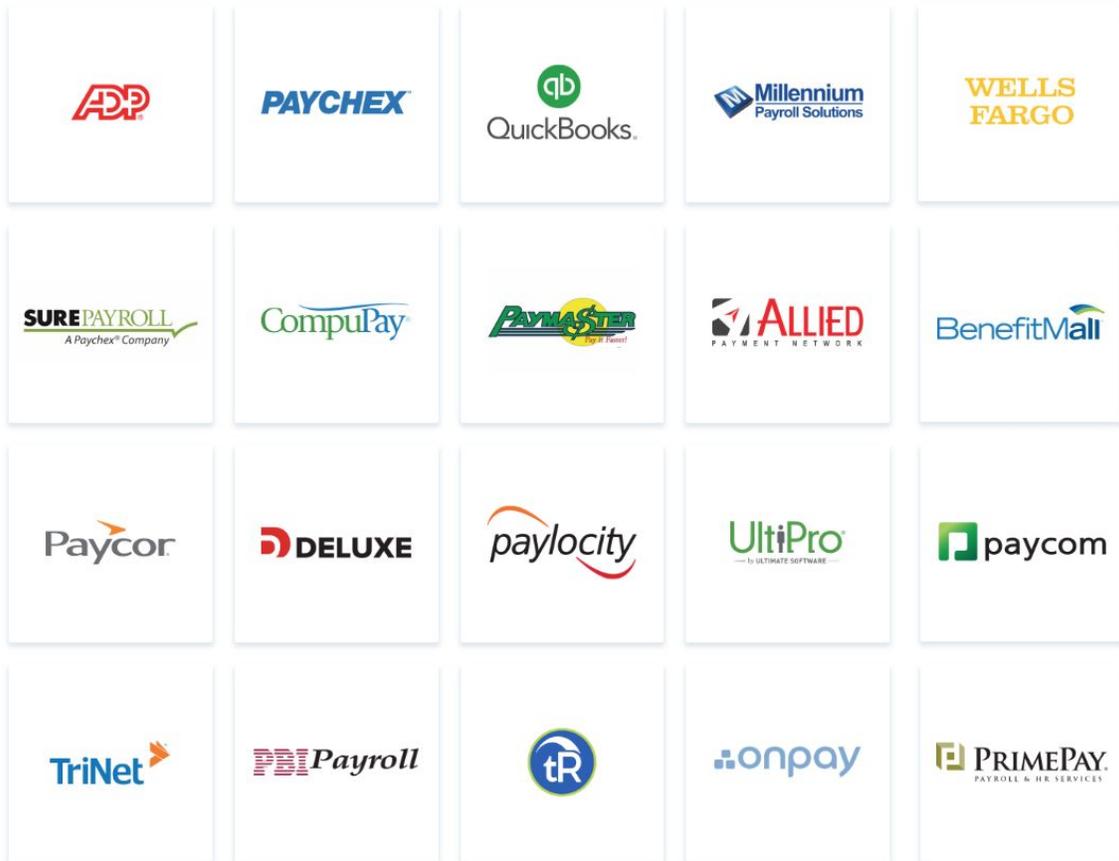
<p>🕒 Time <input type="text" value="8:00am"/> <input type="text" value="4:00pm"/> 8 hrs</p>	<p>Who's Working</p> <p><input checked="" type="checkbox"/> Nancy Causey (40)</p>
<p>🔄 Repeat Options <input type="button" value="Set Open Slots"/></p>	<p>Available</p> <p><input type="checkbox"/> Leona Jorgensen</p> <p><input type="checkbox"/> Mary Burgoyne</p> <p><input type="checkbox"/> Pamela Peraza</p> <p><input type="checkbox"/> Sarah Cahill</p>
<p>📍 No Remote Site Set</p>	

If you have not created leave types or assigned them to employees, the employees will not be able to request leave. Visit our Help Center for a comprehensive guide.

[LEARN MORE](#)

Payroll

Humanity provides export options for many payroll providers, directly from the platform. Simply export your payroll from the list of providers and import the file into your payroll provider, such as QuickBooks or ADP.



By default, employees are not paid for the time they take breaks. Employees can “take a break” from the Humanity app. If your employees are entitled to paid breaks, this can be customized on the account level. If employees are using Humanity’s Time Clock, timesheets can be approved prior to hours being finalized for payroll.

For additional information on Payroll, visit our Help Center.

[LEARN MORE](#)



Refer to our [Help Desk](#) for a quick how-to on any of our features.

For support, chat with us on the web or the Humanity App.

www.humanity.com